

Northern Trust –FlexShares- FA Mag 4.20.17 Webinar

Program / Campaign	Northern Trust FlexShares
Flight / Timing	April 20, 2017 (2-3pm ET)
Publisher	Financial Advisor Magazine

Program Overview

Program Description

- Financial Advisor Webcast
 - FlexShares partners with Financial Advisor to develop webcast title and topic
 - FlexShares will provide the speaker and presentation slides

Roles and Responsibilities

- FlexShares to provide speaker & topic
- Financial Advisor to produce, promote, and host webcast
- Financial Advisor to handle CE Credit application process
- GRP to oversee production process and execution

Key Dates

Development & Approval Process

Execution Timeline:

March 13, 2017: Kick Off Call (KOC)

March 15, 2017

- FlexShares/GRP to provide webcast title, description, speaker info (headshot, bio and contact information), logo and any style guides for banners and html as well as up to three customized questions for the registration page
- FA will submit content for CFP and IMCA CE credit and will begin creating banner ads (120x120, 160x600, 728x90, 300x600, 640x480 and 300x250), html, registration page and website listing.

March 16, 2017

- FA will provide all promotional items to FlexShares/GRP for approval

March 17, 2017

- FlexShares/GRP will provide feedback on promotional items and if revisions are required
- FlexShares/GRP to provide a minimum of four subject lines for the two dedicated e-directs (we can use a single subject line or A/B split per send)

Week of March 20, 2017 (based on turnaround time of approvals listed above)

- Banners will begin running in our e-newsletters and on fa-mag.com

Dedicated E-Directs (2 total) **Tentative** Dates

- March 21 or 22
- April 14 or 18

April 13, 2017

- FlexShares to provide presentation slides and 2-3 seeded questions for our moderator to ask the speaker to get Q&A started for the live webcast

April 18th or 19th

- Tech call with speaker. Note: this is not a practice of the full presentation. This is only a tech call to make sure the speaker is comfortable with the webcast platform.

April 20: 2pm ET

- Launch of webinar

Assets Needed		
Key Deliverables	Task / Owner	Date
<ul style="list-style-type: none"> • Short link for tags should all point to: www.fa-mag.com/NTWebcastApril20 	FlexShares/GRP	3/15
<ul style="list-style-type: none"> • Webcast title & description • Speaker info (headshot, bio and contact information) Speaker photo should be 90px wide X 90px high • Logo: vector EPS file or high resolution logo- Tracking pixels accepted) • Any style guides for banners and html • Up to three customized questions for the registration page • Minimum of four subject lines for the two dedicated e-directs (we can use a single subject line or A/B split per send) 	FlexShares/GRP	3/15

<ul style="list-style-type: none"> FlexShares to provide presentation slides and 2-3 seeded questions for our moderator to ask the speaker to get Q&A started for the live webcast 	FlexShares/GRP	4/13
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Key Contacts	
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*****On the registration page, the standard titles used are:***

Independent Financial Planner/Advisor

Registered Investment Advisor (RIA)

Securities Broker

CPA/Planner

Insurance

Banking

Other

*****During the webinar, the speaker's bio information will appear (name, title, company, photo). You can choose up to 3 additional contact links (Facebook, Twitter, LinkedIn, Website, E-mail)***